

DEPARTMENT OF WORKFORCE DEVELOPMENT  
DIVISION OF WORKFORCE SOLUTIONS  
ADMINISTRATOR'S MEMO SERIES

NOTICE 03-03

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RE: W-2 SCREENING AND  
ASSESSMENT

To: W-2 Agency Directors

From: Mary C. Rowin /s/  
Deputy Division Administrator

**Purpose**

This memo provides updates on the development and plans for implementation of the Wisconsin Works (W-2) Barriers Screening Tool (BST) initiative. This initiative also includes changes in W-2 assessment policy.

**Background**

Administrator's Memo 02-08, released in March 2002, informed W-2 agencies of the Department's plan to design and implement a screening tool for W-2 participants. That memo should be reviewed for a basic understanding of the definitions and purpose of screening for barriers as well as an overview of Domestic Abuse Enhanced Case Management Training requirements. Since the release of Administrator's Memo 02-08, the screening initiative has progressed to the point where plans for implementation are now under way. Over the course of 2002, the following activities have shaped the development of the initiative:

- The Department partnered with the University of Wisconsin-Milwaukee Center for Addiction and Behavioral Health Research to design the BST. Dr. Gwat Yong Lie and Dr. Susan Rose provided research and recommendations on various screening tools that have been tested and found to be valid and reliable with similar populations in other states;
- A workgroup has met periodically to provide guidance in the design of the BST and trouble shoot policy issues. The workgroup is made up of local W-2 agency representatives, disability and domestic abuse experts from the Department of Health and Family Services, a learning disability expert from the National Institute for Literacy, Division of Vocational Rehabilitation representatives, training curriculum writers and Division of Workforce Solutions (DWS) staff;
- The screening tool was field tested in eight W-2 agencies by approximately 25 Financial Employment Planners (FEP). Dr. Lie and Dr. Rose performed an evaluation of the field

test which found overall positive results and feedback from the FEPs who participated. A number of changes were made to the screening tool based on feedback from the W-2 agencies that participated. Most notable was the selection of a different Domestic Violence screening tool that is much shorter and less personally invasive;

- Updates were provided on the progress of the screening initiative and comments were solicited at the August and November W-2 Contract & Implementation (C&I) Committee meetings; and
- The C&I Policy Sub-Committee reviewed and provided recommendations on the policy for implementation of the BST.

### **How is the BST structured?**

A functional screen that looks at the ability of the participant to function in activities of daily living and a domestic violence screen will be completed with all new W-2 participants. The functional screen is an adapted version of a tool used by Wisconsin's Division of Vocational Rehabilitation (DVR) program. Based on answers provided on the functional screen, a follow-up screen (a.k.a. Screen 2) may be triggered that looks more closely at conditions that often go unidentified but are significant barriers to the participant becoming employed. The domestic violence screen and the follow-up screen are a compilation of disability-focused screening tools that have been tested and found to be valid and reliable with similar populations in other states.

### **Policy**

The full BST policy document, a copy of the BST questions and the W-2 Barriers Screening Tool Agreement are attached. Please keep in mind that the BST will be formatted somewhat differently in the automated version, currently under development, to increase ease of use by the screeners. W-2 agency management should review the documents and consider where local planning is needed prior to implementation.

### **Why is the screening process so important?**

The federal Temporary Assistance for Needy Families (TANF) and state W-2 time limits necessitate that employment barriers are identified and needs are addressed early on in an individual's participation. The screening tool will take some of the guess-work out of determining the level of service a participant needs. When properly administered, FEPs will be able to:

1. Use the results of the screening process to refer individuals who are at-risk of significant personal barriers to appropriate service providers for a formal assessment.
2. Apply the information provided through the formal assessment to the development of the Employability Plan. This may include:
  - Obtaining needed medical treatment or counseling;
  - Receiving needed services from other providers in the community; and
  - Ensuring participants have the necessary accommodations to successfully engage in W-2 work training and ultimately unsubsidized employment.

The BST will be mandatory for use by all W-2 agencies. Participants will indicate at the bottom of the W-2 Barriers Screening Tool Agreement (see attached), their decision to complete the screening process or decline to be screened. The participant may decline to be screened without risk of sanction or case closure.

We applaud those agencies who have developed their own screening tools in the past. Your prior experience is important to helping the Department evaluate the BST and make

adjustments where needed. However, it is important for there to be consistency across the state in the use of a screening tool. This process will enable both agencies and the Department to capture important information about the characteristics of our caseload and adapt our program as needed. More importantly, statewide screening ensures that participants have equal access to screening and follow-up services throughout the state.

The important role that W-2 agency managers have in making this initiative a success cannot be overstated. There will be a period of learning and skill-building before FEPs and other designated screeners are comfortable with the process. These screeners must receive positive reinforcement from their supervisors during those initial screening meetings with participants. Staff from DWS will also be available for technical assistance during this critical time.

FEPs must be familiar with and have access to the service providers in their community that can provide needed follow-up formal assessments. Agencies are encouraged to update service provider lists and review the information with their FEPs.

Most importantly, management must ensure that FEPs are empowered to use the results of a formal assessment to develop and implement employability plans. All of the services and accommodations that are recommended to help a participant succeed in a work setting must be considered by the FEP and those that fit within the guidelines of the W-2 program must be incorporated into the participant's Employability Plan.

## **BST Implementation Issues**

### *Implementation Roll-Out*

Each W-2 agency will be required to implement the BST at a date to be determined by the Department after all appropriate individuals within the agency have completed the BST Training. Implementation will be rolled out region-by-region, beginning with Milwaukee.

### *BST Training*

All individuals designated to administer the BST must have FEP training (or the equivalent as determined by the DWS Partner Training Section) and participate in the BST training course. In addition to those who are selected to administer the BST, all other W-2 agency FEPs and FEP supervisors must complete the BST training course so that they have a general understanding of the tool and can use the screening results to provide appropriate worksite accommodations.

The Department has invested a significant amount of resources in the development of the BST training course. The course will provide information on the history and background of the screening tool, detailed review of the content of the screening questions, policy, and the opportunity to practice using the automated tool.

Training will be provided regionally beginning in March 2003 in Milwaukee. As training in one region concludes, training will begin in the next with some overlap, until all seven regions have received training. Because implementation will not occur in a region until all staff in that region have been trained, it is important that agencies register all appropriate staff for the sessions scheduled in their regions.

Announcements and information about training sessions will be provided in a timely manner using all of the resources available to the DWS Partner Training Section. Future training for the

screening tool will be incorporated into New Worker Training. More information on this will be available after the initial rollout.

#### *Automation*

The BST will be administered using an automated web-based program that is linked with CARES. This new web-based program has features that will allow both ease of use by the screener and more rigorous security measures that will ensure confidentiality of the participant. Screeners receive prompts throughout the screening process that help them determine which questions are to be asked and what, if any, assessment referrals should be made based on the screening results. W-2 agencies will be given access to the web-based program shortly before their scheduled BST implementation date. Hands-on practice with the automated tool will be provided during the BST training course.

#### *Non-English Speaking Participants*

The Department will be working with a contractor to translate the BST into the Spanish and Hmong languages. Agencies are expected to use translator services for Spanish and Hmong speaking participants until the Department releases the translated versions. Agencies are expected to use translator services on an ongoing basis with all other non-English speaking participants.

REGIONAL OFFICE CONTACT: Area Administrators

#### **Attachments**